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**DIFFERENTIATION IN ROLES OF
SCHOOL NURSES AND UNLICENSED ASSISTIVE PERSONNEL**

A Master's Project

Presented to

The Faculty of the School of Nursing

San Jose State University

In partial Fulfillment

Of the Requirements for the Degree

Master of Science

By

Lynn Shieh

December, 1999

ABSTRACT

DIFFERENTIATION IN ROLES OF SCHOOL NURSES AND UNLICENSED ASSISTIVE PERSONNEL

By Lynn Shieh, RN, BSN, PHN

School nurses provide a vast number of health services for students, teachers, and staff. Despite school nurses' important contributions to the health status of students, through the years their positions have been gradually supplemented by Unlicensed Assistive Personnel (UAP) / Health Clerks. With the number of UAPs increasing in the school setting, roles and responsibilities of school nurses and UAPs need to be clearly differentiated in order to utilize the UAP's services legally and efficiently. This research used a descriptive survey to investigate the perceptions that differentiate the role of school nurses and UAPs among school administrators, nurses, UAPs, secretaries, and office clerks in a selected Northern California school district. The study described their views about the responsibilities of school nurses or UAPs for specific tasks in health services. A job description was developed based on the results of the survey to provide clear guidelines of the UAP's responsibilities to school personnel.

Differentiation in Roles of School Nurse and Unlicensed Assistive Personnel

Introduction

School nurses provide a vast number of health services for students, teachers, and staff. Nurses serve a vital role in ensuring the health of students and staff both physically and psychologically. Despite school nurses' important contributions to the health status of students, through the years their positions have been gradually supplemented by Unlicensed Assistive Personnel (UAP) / Health Clerks. This shift is due to limited resources of the school districts (Bagnall, 1997). With the number of UAPs increasing in the school setting, roles and responsibilities of school nurses and UAPs need to be clearly differentiated in order to utilize the UAP's services legally and efficiently. Hutcherson, Sheets, and Williamson (1998) emphasized that nurses, educators, and UAPs need to identify and clarify expectations about the utilization of the UAPs. Guidelines to assist nurses in working effectively with UAPs should be developed and updated to reflect the current health care environment. Therefore, this research used a descriptive survey to investigate the perceptions that differentiate the role of school nurses and UAPs among school administrators, nurses, UAPs, secretaries, and office clerks in a selected Northern California school district. The study described their views about the responsibilities of school nurses or UAPs for specific tasks in health services. A job description was developed based on the results of the survey to provide clear guidelines of the UAP's responsibilities to school personnel.

The Problem

School nursing practice has changed tremendously throughout the years. As the cost of education increased and resources of school districts decreased, and as school nurses retired or resigned, they were gradually replaced by UAPs (Whited & Starke, 1989). Unlicensed Assistive Personnel (UAP) / Health Clerks were defined by American Nurses Association (1994) as persons who were trained to provide assistance in patient or client care activities which were delegated and supervised by the registered professional nurse (RN).

The definition of delegation is “the transfer of responsibility for the performance of an activity from one individual to another, with the former retaining accountability for the outcome” (American Nurses’ Association, 1994, p.11). The Registered Nurse (RN) remains responsible and accountable for the care provided by the UAP to whom she/he delegates the nursing activities (National Association of State School Nurse Consultants, 1996). The RN decides which student care activities may be delegated, to whom, and under what circumstances based on professional judgment. “This professional judgment is framed by the state nursing practice act and national standards of nursing. Institutional policies cannot contradict state law” (American Nurses’ Association, 1994, p.11).

Despite the important role of school nurses in the school setting, their numbers are substantially decreasing due to limited resources in school districts (Passarelli, 1994). Legislatures and other sources recognize the importance of school nursing services and attempt to maintain these essential services with the limited resources available by delegating responsibilities to personnel with few or no credentials (Fryer & Iggoe, 1996).

These personnel are classified as Unlicensed Assistive Personnel (UAPs) or Health Clerks in the school setting.

Generally speaking, an RN can only delegate those nursing tasks to UAPs that are within the UAP's training and job description in the school district (Sheehan, 1998). Even though nursing tasks have been delegated to UAPs and UAPs are supervised by a RN, the RN is still held responsible for those tasks. The California Board of Registered Nursing issued an advisory statement on UAPs (1994) which stated that "as in all aspects of nursing care, the registered nurse is held accountable and responsible for carrying out the assignment" (p.4). Therefore, RNs must have a clear understanding of their own roles and of the responsibilities that may be delegated to UAPs. With this understanding, RNs can delegate tasks to the appropriate UAPs based on the UAPs training and job descriptions in the school district.

Unfortunately, roles and responsibilities of RNs and UAPs are unclear to most of the school staff, such as administrators, secretaries, office clerks, and even to RNs and UAPs themselves in some school districts, especially in the school districts with outdated job descriptions for UAPs. This confusion about the roles and responsibilities of RNs and UAPs along with outdated job descriptions may pose a detrimental risk when delivering health services to students and staff. Therefore, it is important to clarify the roles of RNs and UAPs and to differentiate their responsibilities in health care services. These differences must be communicated to school staff in order to utilize the UAPs' services safely and effectively. In addition, job descriptions for UAPs should be updated to provide clear guidelines to all school personnel when utilizing the services of UAPs.

Purpose of the Study

The purpose of this study was to investigate the perceptions and differentiate the role of school nurses and Unlicensed Assistive Personnel (UAPs) among school administrators, school nurses (RNs), UAPs/Health Clerks, secretaries, and office clerks in a selected Northern California school district. The study evaluated their perceptions of the responsibilities of school nurses or UAPs for specific tasks in health services. A job description was developed based on the results of the survey to provide clear guidelines of the UAPs' responsibilities to school personnel.

Significance of the Study

Confusion about the roles and responsibilities of school nurses and UAPs among school personnel poses a significant risk to the health of all students and to staff they serve. Without the guidance from an updated job description for UAPs in the school district, RNs are unable to delegate nursing tasks to UAPs appropriately, and school personnel are unable to utilize the services of UAPs' effectively. Therefore, this study was conducted to investigate the perceptions that differentiate the role of school nurses and UAPs among school personnel. In addition, a job description for UAPs was developed to provide clear guidelines to all school personnel when utilizing the services of UAPs.

Research Questions

Research questions include: (a) which school nursing services are viewed as "always" the responsibility of school nurses or UAPs; (b) which school nursing services are viewed as "sometimes" the responsibility of school nurses or UAPs; and (c) which school nursing services are viewed as "never" the responsibility of school nurses or UAPs.

Review of Literature

School nursing practice has changed tremendously throughout the years. The health services have broadened in schools to meet the changing needs of the society and school communities (Wold, 1981). Several changes exist in the population of schools as well, such as (a) changing family structures due to divorce and remarriage, (b) increasing numbers of immigrants and homeless families, and (c) struggling families with problems of poverty, violence, and drug abuse (Passarelli, 1994). These family structure and societal issue changes force schools to alter the scope and nature of their health services to meet the changing needs of an increasing number of children who are coming to school with physical and/or emotional problems (Passarelli, 1994). This alteration has increased the importance of the school nurse's role and function in the school health services.

Roles of school nurses may include: (a) coordinator, (b) consultant, (c) researcher, (d) clinician, (e) educator, (f) administrator, and (g) manager (Hamric & Spross, 1989). School nurses coordinate and implement California State mandated health screening, such as (a) vision, California Education Code (CEC) 49452, (b) color vision, California Administrative Code (CAC) 595, title 5, (c) hearing CEC 11823, and (d) scoliosis, CEC 49452.5. The law also requires that the governing board of any school district shall provide for the testing of the sight and hearing of each pupil enrolled in the schools of the district (CEC 49455). Upon entering kindergarten and continuing throughout a student's academic career, vision, color vision, hearing, and scoliosis screenings are required by many states (Stone & Perry, 1990). The State of California indicated that these health screenings should be conducted by the school nurses or other authorized person. These state mandated requirements illustrate the importance of the school nurse's role in the school setting.

School nurses practice as consultants when they participate and provide health information to students and the Student Study Team. They conduct the initial and triennial health assessments of students with special needs and present this health information to the Student Study Team. School nurses use the holistic approach to assess a student's health by including the family's perspective in relation to the student's health and educational needs. This approach promotes family collaboration and enhances insight in interdisciplinary team planning for students (Papenfus & Bryan, 1998). Using a systematic process also maximizes the options for the family and the interdisciplinary team, and it greatly increases the success for the successful education of students. Therefore, school nurses play an important role in promoting the student's health and education.

School nurses may perform the role of clinician and/or researcher in the schools. They conduct medical case findings, assessments, screenings, referrals, and follow-up activities related to the students suspected or identified as having health problems (Passarelli, 1994). The school nurse (a) assesses the students' health status, (b) screens for any potential health hazard, (c) identifies health problems which may influence a student's learning, (d) informs parents, and (e) refers students to appropriate health care agencies. They also provide counseling and education to students and school staff members who have health problems (Stone & Perry, 1990).

School nurses often are expected to serve as a health education resource person to teachers and students. Frequently they assume the responsibilities for assessing the health education needs of individual students and school staff members and for providing one-on-one or small group education (Bradley, 1997). Therefore, school nurses function as an

educator and as a resource person for students, teachers, and school staff members while promoting health.

School administrators are responsible for the health services provided by RNs and UAPs in the school. They are legally liable for the safety and well-being of all students including mandated and required health services provided by qualified school personnel. However, they are not legally responsible for deciding the level of care required by each student with special health care needs (National Association of State School Nurse Consultants, 1996).

Rules for delegation of nursing functions need to be clarified in order to utilize UAPs effectively (Hutcherson et al., 1998). These rules can only be clarified if roles of school nurses and UAPs are clearly identified and differentiated in schools. Unfortunately, limited research has been done by nursing professionals in identifying roles of UAPs and in differentiating the roles of RN and UAP in the school setting.

The role of the school nurse has been intensively studied and reported by several professional nurses on the perceptions of various groups such as (a) school nurses (Greenhill, 1979; Oda, 1979; Palmer, 1993), (b) school administrators (Goodwin & Keefe, 1984; Greenhill, 1979; Lucero, 1978; Perez, 1995), (c) teachers (Goodwin & Keefe, 1984; Greenhill, 1979; Kremer, 1993; Lucero, 1978; Sadik, 1992), and (d) parents (Cassel, 1993; Nehl, 1989). However, no survey has been done on the perceptions of the school nurse role as seen by other school personnel, such as secretaries, UAPs, and office clerks.

Studies on the roles and functions of UAPs in the school setting have identified duties such as: (a) performing clerical tasks, (b) supporting school nurses, (c) assisting ill and injured students, and (d) maintaining health office supplies under supervision of the

school nurse (California School Nurses Organization [CSNO], 1990). The major responsibility of the UAP has been providing clerical support for the nurses in the schools which frees the school nurse to focus on the tasks requiring professional judgment and skill (CSNO, 1990). Therefore, the UAP has made an important contribution in restoring and improving the health of students.

The school districts have been required by state law to provide reasonable treatment to ill or injured students during school hours (CEC 49400). One of the major functions of UAPs has been to provide basic first aid to all ill or injured students in the health office or on the school grounds. Maintaining a clean health office and ordering supplies or equipment have also been part of the UAP's daily routine.

Major roles of UAPs have been listed on the job descriptions for UAPs in several school districts in Northern California. In 1990, CSNO published an article to illustrate roles and duties of UAPs in the school setting. The responsibilities of UAPs can be summarized as follow:

1. Performs routine first aid and cares for ill and injured students according to established procedures or regulation (Berryessa Union School District [BUSD], 1998; CSNO, 1990; Campbell Union School District [CUSD], 1997; Franklin McKinley School District [FMSD], 1979; San Jose Unified School District [SJUSD], 1988; Santa Clara Unified School District [SCUSD], 1996).
2. Assists with a variety of routine clerical duties and selected technical tasks (BUSD, 1998; CSNO, 1990; CUSD, 1997; FMSD, 1979; SJUSD, 1988; SCUSD, 1996).

3. Evaluates the immunization records of students, alerts parents of any needed immunizations, and maintains communication with parents until the immunizations are up to date and records are provided (CSNO, 1990; CUSD, 1997; SJUSD, 1988; SCUSD, 1996).
4. Notifies parents of community resources and the available clinic programs and assists with scheduling appointments (CSNO, 1990; SJUSD, 1988).
5. Assists the school nurse with the preparation for health screening and records screening results on student's health records (BUSD, 1998; CSNO, 1990; CUSD, 1997; FMSD, 1979; SJUSD, 1988; SCUSD, 1996).
6. Prepares, distributes, and replenishes First Aid Kits for classrooms and Disaster First Aid Kits at designated areas of the school (BUSD, 1998; CSNO, 1990; CUSD, 1997; SJUSD, 1988).
7. Maintains an accurate list of students with serious health problems and distributes to administrators, teachers, and staff (CSNO, 1990; CUSD, 1997).
8. Maintains the daily log of students receiving first aid (BUSD, 1998; SJUSD, 1988; SCUSD, 1996).
9. Maintains the Health Office inventory and orders supplies when necessary (CSNO, 1990; CUSD, 1997; FMSD, 1979; SJUSD, 1988).
10. Maintains the Health Office and the equipment in a clean, orderly, and safe condition (SJUSD, 1988; SCUSD, 1996).
11. Assures that written doctor or nurse practitioner's orders and signed permission slips are on file for all medications to be administered to students (CUSD, 1997).

12. Administers prescribed medications to students as instructed by doctors and as approved or permitted by parents (BUSD, 1998; FMSD, 1979; SJUSD, 1988; SCUSD, 1996).

13. Assists in identifying at-risk students and maintains an accurate list of students exempted from the health care screening (CSNO, 1990; SJUSD, 1988).

14. Maintains accurate health files and duplicates materials when necessary (CSNO, 1990; FMSD, 1979; SCUSD, 1996).

15. Assists nurse with communicable disease screenings, such as lice in the classroom (CSNO, 1990; SJUSD, 1988).

The job descriptions for UAPs clearly illustrated the roles and responsibilities of UAPs in each particular school district. It provided definite guidance to all personnel for the assigning of UAPs in the school. It reduced liability risks for schools that used the UAP's services (Helm, 1998). The job description was an administrative tool that clearly defined and differentiated different roles in practice (Forsey, Cleland, & Miller, 1993). All school personnel, including administrators, nurses, educators, UAPs, and office staff should function as a team to identify the needs and the expectations of the UAP's roles (Hutcherson et al., 1998). All school staff should be able to clearly differentiate the various roles and responsibilities of school nurses and UAPs in order to utilize nursing services effectively. Guidelines and tools should be developed and updated to assist nurses to work with UAPs efficiently and to help school personnel to utilize their services accurately (Hutcherson et al., 1998). This research of differentiation in roles of school nurses and UAPs is important to providing those guidelines.

Research Methodology

Research Design

This descriptive survey used a questionnaire/survey of school personnel in a selected school district in Northern California. Packets consisting of a consent form and a questionnaire were sent to 85 subjects through inter-district mail. The importance of participation was addressed in the consent in an effort to increase the response rate. A large yellow envelope was placed on the wall inside the health office at each school and district office to collect the returned questionnaires. The surveys were collected at each site once a week for four weeks. An computer analysis was conducted of the questionnaire responses using the Statistical Package for the Social Sciences (SPSS), and the findings were synthesized to determine the nursing tasks viewed as “always, sometimes, or never” the responsibilities of the school nurse or the UAP. The questionnaire included demographic information such as (a) educational background, (b) work experience, and (c) current job title.

Subjects and Sampling

Subjects for this quantitative study were taken from a population of 85 school personnel in Northern California between the ages of 25-70 years of age. There were 30 school administrators, 8 school nurses, 4 UAPs, 15 secretaries, and 28 office clerks from the selected school district in Northern California. The convenience sample was taken from the district personnel directory for the school year of 1998-1999.

Setting

The setting of this research was the district office and the 14 schools of the district. The subjects were instructed to complete the questionnaire and place it in the large envelope inside the health office at each school or at the district office.

Research procedure

To maintain confidentiality, each packet had a number in the bottom left hand corner. That number corresponded to a key which was only to be used to send out a friendly second reminder letter with another questionnaire after 2 weeks to those participants who had forgotten to return the first questionnaire. Otherwise, the key remained locked in a safe at the American Savings Bank. No names were used, and confidentiality was upheld. There were no risks and/or benefits to participants in this study. Once the questionnaires were returned, a list was compiled of all nursing services that were considered as "always", "sometimes", or "never" the responsibility of school nurses or UAPs by administrators, school nurses, UAPs, secretaries, and office clerks in this district in Northern California. A job description for UAPs was developed.

Data Collection Tool

The School Nursing Services Questionnaire (see Appendix A) was designed by the researcher and used to collect data from participants. The survey included 21 questions. The first 20 questions measured the perceptions of each participant regarding the responsibilities for particular nursing tasks. The participants indicated with a check mark in one of three columns under the UAP and School Nurse categories whether they felt the particular task was "always", "sometimes", or "never" the responsibility of UAP or the School Nurse. Item 21 asked about services not listed that participants felt the UAPs should be providing to the schools. The last page of the questionnaire asked for demographic data from participants.

Analysis and Interpretation of the Data

The purpose of this section is to present the study findings. A description of the sample followed by results pertaining to the research questions is given. As discussed earlier in this paper, the purpose of this study was to investigate the perceptions and differentiate the role of school nurses and Unlicensed Assistive Personnel (UAPs) among school administrators, school nurses, UAPs/health clerks, secretaries, and office clerks in a selected Northern California school district. This study evaluated their perceptions of the responsibilities of school nurses or UAPs for specific tasks in health services. A job description of UAPs (Table 1) was developed to provide clear guidelines of the UAP's responsibilities to school personnel based on the results of the survey.

The sample population ($N=41$) was divided into school nurses and others. The others sample population included (a) school administrators, (b) UAPs/health clerks, (c) secretaries, and (d) office clerks. The survey responses were analyzed using two sample groups (school nurses and others) and divided into three categories (always, sometimes, and never).

Characteristics of the sample

The survey was sent to 85 school personnel through inter-district mail in a selected school district in Northern California. In the population, there were 30 school administrators, 4 UAPs, 15 secretaries, 28 office clerks and 8 school nurses. Administrators, UAPs, secretaries, and office clerks were classified as "others" and nurses were coded as "nurses" for data analysis. Of the 85 surveys distributed, 42 (49 %) were returned. Of the 42 surveys returned, 41 (98%) were completed sufficiently to be analyzed which made the "others" sample to consist of:

Table 1

Job Description of Unlicensed Assistive Personnel

1. Performs routine first aid procedure and assists in screening ill and/or injured students.
 2. Performs a variety of routine clerical duties. Maintains files and duplicate materials, as needed.
 3. Screens student records for proper immunizations and alerts parents of needed immunization.
 4. Notifies parents of the clinic program and schedules appointments for the physical examination.
 5. Assists with the preparation and arrangements for health testing programs performed by the school nurse.
 6. Prepares, distributes, and maintains First Aid and Disaster First Aid Kits for school classroom.
 7. Maintains an accurate list of students with serious health problems and distributes it to administrators and teachers.
 8. Maintains a daily log of students receiving first aid.
 9. Maintains the health office inventory and orders supplies when necessary.
 10. Maintains health office and equipment in a clean and orderly manner.
 11. Assures that written doctor's or nurse practitioner's orders and signed parent/guardian permission slips are on file for all medications to be administered to students.
 12. Administers medications to students as instructed by doctors or nurse practitioners and parents.
 13. Maintains an accurate list of students exempted from the health care program.
 14. Assists with classroom inspections for communicable diseases, such as lice.
-

(a) 14 (45% return) administrators, (b) 4 (100% return) UAPs, (c) 4 (27% return) secretaries, and (d) 12 (43% return) clerks. The return rate for nurses was 7 (87%) out of 8 in the population.

Demographics

The demographic description of the 41 respondents showed 34% were 50-59 years old and 22% were 40-49 years old. The majority of respondents were female (92%), married (57%), and had children (81%).

Educational background revealed: (a) 25% held only a high school diploma, (b) 46% held Bachelor of Science or Art degrees, and (c) 14% held Master of Science or Art degrees. Respondents were educated in the following disciplines in descending order of frequency: (a) education (33%), (b) nursing (15%), (c) high school (15%), (d) public health (13%), and (e) other (13%) or missing cases (11%).

Years of school experience in descending order of frequency were as follows: (a) 20-24 years (33%), (b) 11-14 years (23%), (c) 5-10 years (17%), (d) 15-19 years (12%), (e) both the categories of 0-4 years and 25 or more years (7%), and (f) missing case (1%). Eighty-seven percent of respondents worked full-time. Sixty-six percent of respondents served students age 0-14 years, and 37% served students age 11-14 years.

The ethnicity of respondents were Caucasian (44%), Hispanic American (41%), and Asian American (11%). The ethnicity of students they served were mostly Hispanic American, Caucasian, Asian American, and South East Asian.

Some schools only had access to services of a nurse such that 36% of respondents did not work with UAPs/Health Clerks in their schools. On the other hand, most of those respondents

who did work with UAPs, worked with them for 5 days a week. Seventy-six percent of respondents worked with nurses in their schools 2 days a week.

Results Related to the Research Questions

The sample population was distinguished and divided into two groups, school nurses and others. Each group's responses were subdivided into the discrete responses labeled "always", "sometimes", or "never." Scatter charts were used to illustrate the agreement and disagreement of the responses from the two groups to which tasks should be "always", "sometimes", or "never" the responsibility of UAPs or nurses. The correlation coefficient (R) indicated good agreement between groups if the value was 0.7 or greater. Any values below 0.5 indicated significant deviation in the responses.

There were four scatter charts that indicated good agreement among the two groups ($R \geq 0.73$). These were "always" and "never" tasks for unlicensed assistive personnel (Figures 1 and 2) and "always" and "sometimes" tasks for nurses (Figures 3 and 4). These showed that the nurses and others populations agree with a 95% confidence level. Figure 1 suggested that both groups agreed with implementing state mandated vision, hearing, and scoliosis screening, providing health information, and serving as a resource person would never be the responsibilities of unlicensed assistive personnel ($R=0.7593$). Questionnaire items 2, 4, 5, 6, 7, 8, 11, 13, 15, 18, 19, and 20 fell between upper and lower bounds of the "always" chart (Figure 2) for unlicensed assistive personnel ($R=0.7396$). Both groups agreed that tasks of (a) routine clerical duties, (b) assistance to parents and nurse's, and (c) maintenance of health office, supplies, and records would be "always" unlicensed assistive personnel's responsibilities.

Nurses vs Others Response for "Never" Tasks for Unlicensed Assistive Personnel

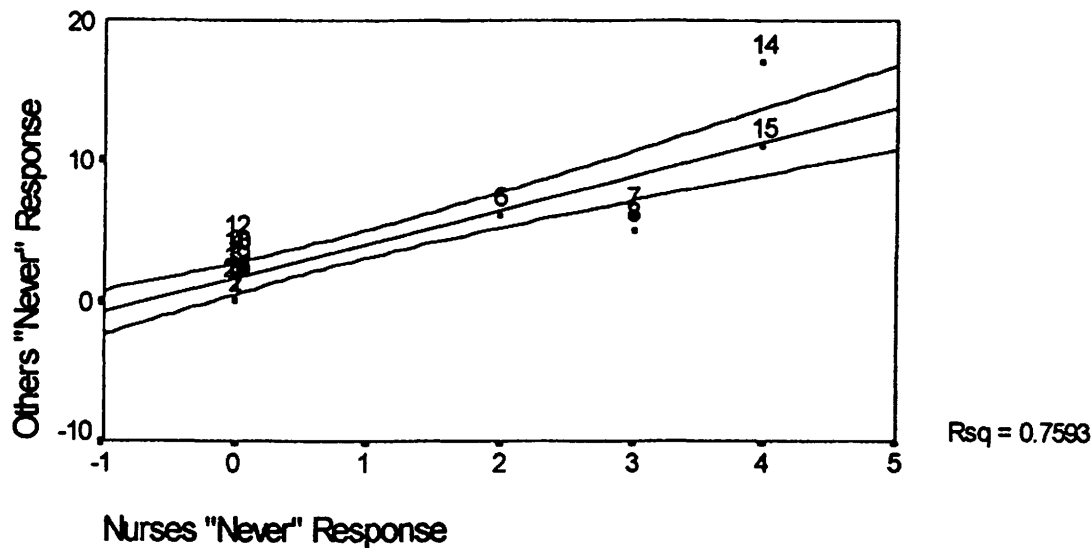


Figure 1. Nurses versus Others Response for "Never" Tasks for Unlicensed Assistive Personnel.

Nurses vs Others Response for "Always" Tasks for Unlicensed Assistive Personnel

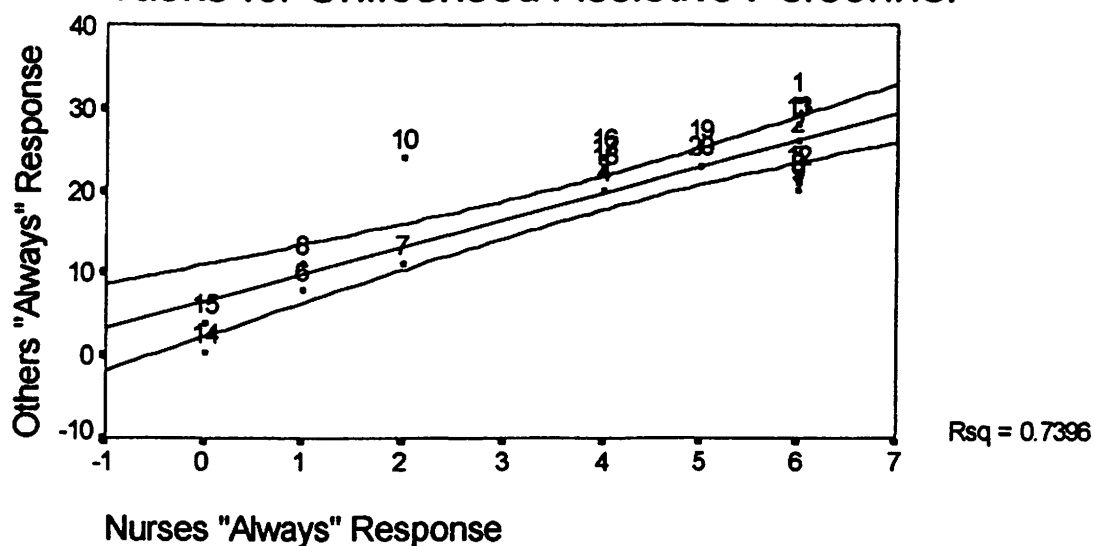


Figure 2. Nurses versus Others Response for "Always" Tasks for Unlicensed Assistive Personnel.

Nurses vs Others Response for "Always" Tasks for Licensed Nurses

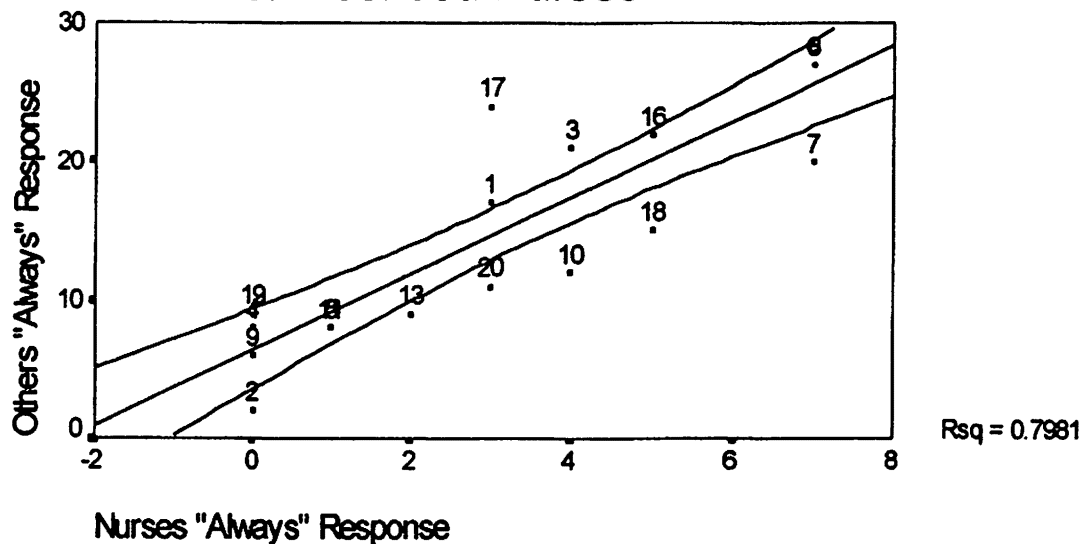


Figure 3. Nurses versus Others Response for "Always" Tasks for Licensed Nurses

Nurses vs Others Response for "Sometimes" Tasks for Licensed Nurses

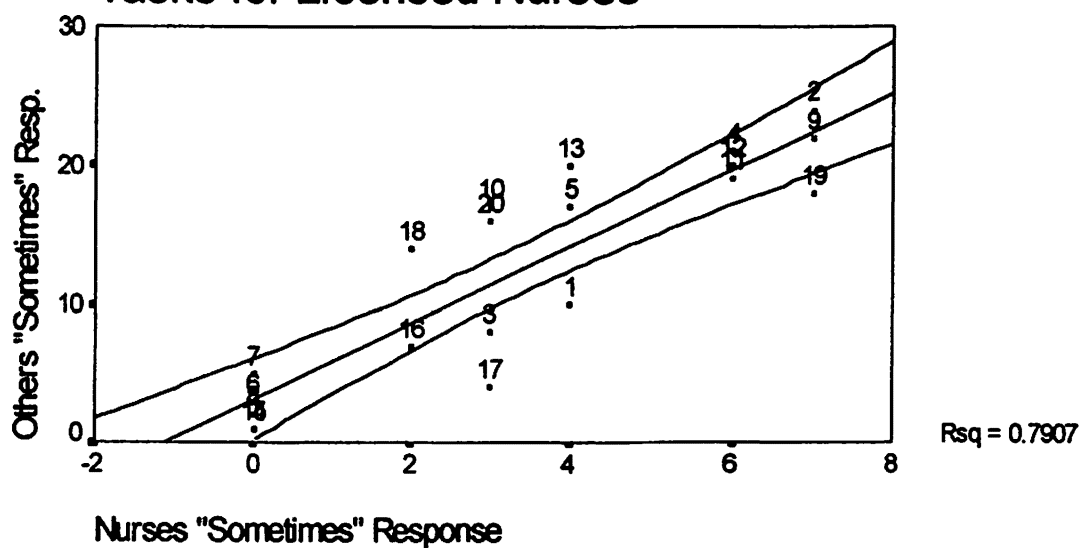


Figure 4. Nurses versus Others Response for "Sometimes" Tasks for Licensed Nurses

Figure 3 showed that most respondents agreed ($R=0.7981$) that notifying parents of the clinic programs, arranging for health testing programs, and coordinating state mandated programs would "always" be tasks for licensed nurses. These were the responses between the upper and lower bounds as an "always" task for the licensed nurse as indicated by questionnaire items 1, 4, 5, 6, 9, 11, and 16.

The upper and lower bounds of responses to "sometimes" tasks for licensed nurses applied to questionnaire items 2, 4, 6, 7, 8, 9, 11, 12, 15 and 16. Figure 4 showed that both groups agreed ($R=0.7907$) that tasks of (a) preparing First Aid Kits, (b) conducting medical case finding, and (c) assuring all medication slips on file are signed by doctors and parents would "sometimes" be the responsibility of licensed nurses.

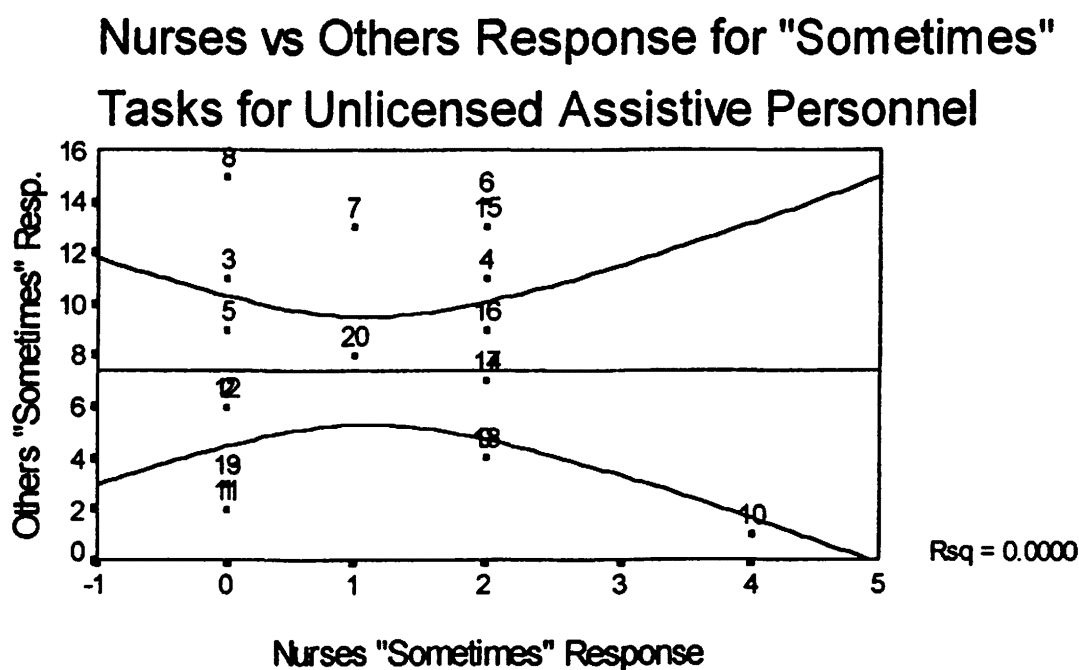


Figure 5. Nurses versus Others Response for "Sometimes" Tasks for Unlicensed Assistive Personnel.

Some of the data was inconclusive. For instance, the response of “sometimes” tasks for unlicensed assistive personnel had no correlation or agreement ($R=0$) among the two populations (Figure 5). For the category of “never” tasks for nurses, the correlation coefficient was not calculated because both groups agreed that the licensed nurse could do the tasks. This signified that both groups believed nurses were responsible for all nursing tasks delivered to students or school personnel.

The objective of this survey was to determine the nursing tasks that would comprise responsibilities for a job description of the UAP and of the school nurse. Table 2 summarized the nursing tasks as the primary or secondary responsibilities of the licensed nurse or the UAP. All nursing tasks described on the questionnaire were considered as primary responsibilities of the UAP by survey respondents except items 6, 7, 8, 14, and 15. Those nursing tasks can only be performed by licensed nurses.

Whereas some tasks could be performed by UAPs and supervised by nurses (Items 3, 16, 17, 19 and 20), they were listed as primary responsibilities for both the UAP and the nurse by respondents. In addition to the tasks listed on the survey, three respondents felt that the UAPs should also: (a) call parents for illness and injuries, (b) send forms for nurses, (c) assist in home visits, and (d) provide translation services for families if applicable. Based on the results of the survey, a job description for UAPs (Table 1, see page 15) was developed to provide clear guidelines of the UAP’s responsibilities to school personnel.

Table 2

Question	Unlicensed Assistive Personnel Responsibility		Nurse Responsibility	
	Primary	Secondary	Primary	Secondary
1. Performs routine first aid procedures and assists in screening ill and/or injured children.	X		---	---
2. Performs a variety of routine clerical duties.	X			X
3. Screens student records for proper immunizations and alerts parents of needed immunizations.	X		X	
4. Notifies parents of the clinic program and schedules appointments for the physical examination.	X			X
5. Assists with the preparation and arrangements for health testing programs performed by the school nurse.	X			X
6. Coordinates and implements mandated programs: vision and color vision, hearing and scoliosis requirements.		X	X	
7. Participates and provides health information to students and Student Study Team.	---	---	X	
8. Conducts medical case findings, assessments, screening, referrals and follow-up activities related to students suspected or identified as having health problems.	---	---	X	
9. Prepares, distributes, and maintains First Aid and Disaster First Aid Kits for school classrooms.	X	---		X
10. Maintains an accurate list of students with serious health problems and distributes it to administrators and teachers.	X		---	---
11. Maintains a daily log of students receiving first aid.	X			X
12. Maintains the health office inventory and orders supplies when necessary.	X			X
13. Maintains health office and equipment in a clean and orderly manner.	X			X
14. Provides initial and triennial health assessments of special education and other students, if needed.		**	X	
15. Serves as a resource person to teachers and students in health education.		---	X	
16. Assures that written doctor's or nurse practitioner's orders and signed permission slips are on file for all medications to be administered to students.	X		X	
17. Administers medications to students as instructed by doctors or nurse practitioners and parents.	X		X	
18. Maintains an accurate list of students exempted from the health care program.	X		---	---
19. Maintains files and duplicate materials, as needed.	X		X	
20. Assists with classroom inspections for communicable diseases, such as lice.	X		X	

** Indicates a strong response of "NEVER".

--- Indicates no clear preference.

Limitations

This study was limited by design, measurement, and sample. The questionnaire limited responses to “closed-ended” items which may have caused some limitation to responses (LoBiondo-Wood & Haber, 1986). The measurement tool was untested for validity and reliability. The voluntary participation, lack of randomization, and the small sample size may have led to bias. Because it was a convenience sample from a specific school district of Northern California, the results can not be generalized to all school personnel. Personal interest and knowledge of the unlicensed assistive personnel could also influence the return rate or the responses to a survey questionnaire.

Recommendations

Many things could be done to insure quality school nursing services. Further studies, including larger populations and sampling across regions, should be used to collect pertinent data. Rigorous research with collaborative studies would further conceptualize the role of the unlicensed assistive personnel/health clerks.

A series of classes should be offered to educate all school personnel regarding the roles and responsibilities of UAPs/health clerks in the particular school district. The newly developed job description of UAPs could be utilized as the fundamental knowledge and serve as the guideline in these classes. A survey should be conducted after each class to evaluate the effectiveness and usefulness of the classes.

Conclusion

The purpose of this descriptive correlational study was to investigate the perceptions and differentiate the role of school nurses and unlicensed assistive personnel (UAPs) among school personnel in a Northern California school district. There has been confusion about the roles and

responsibilities of school nurses and/or UAPs among administrators, office personnel, nurses and UAPs. In this school district of Northern California, there were no updated job descriptions for UAPs which added to the confusion among school personnel. This survey examined the perceptions that differentiate the roles of school nurses and UAPs. Findings from this research may clarify the roles of the school nurse and the UAP and differentiate their responsibilities in the school health services.

Based on the results of the survey, a job description for UAPs was developed to provide clear guidelines of the UAP's responsibilities to school personnel. A data collection tool, the School Nursing Services Questionnaire (Appendix A) was developed and used to collect data from participants to evaluate their perceptions of the responsibilities of school nurses or UAPs for specific tasks in health services.

The research was a success. Forty-eight percent of participants ($N=41$) returned the survey and provided sufficient data for analysis. Both groups showed agreement in four categories with 95% confidence level. Nursing tasks which should be "always" responsibility of UAPs were items 1 to 20 except 6, 7, 8, 14, and 15. Those nursing tasks should be "always" the responsibility of nurses. According to the returned survey, none of the nursing tasks were considered "never" responsibility of nurses. In another words, nurses are responsible for all nursing tasks performed in the school. This result of the survey correlates with the advisory statement issued by the California Board of Registered Nursing on UAPs (1994) which clearly stated that "as in all aspects of nursing care, the registered nurse is held accountable and responsible for carrying the assignment"(p.4).

The ultimate objective of this survey was to develop a job description for UAPs in the selected school district of Northern California based on the results of this survey. The resulting

job description is documented in Table 1, page 15. A table of nursing tasks (Table 2, see page 22) was summarized according to the weighted responses of each question from the sample population. This table provided clear illustration of nursing tasks which were listed as primary responsibility of UAPs by respondents. A job description of UAP was developed based on those nursing tasks to provide clear guidelines of the UAP's responsibilities to school personnel. This survey has provided a tremendous knowledge background for the job description development.

SCHOOL NURSING SERVICES QUESTIONNAIRES

Directions: Please indicate with a check mark in one of three columns under the Unlicensed Assistive Personnel (UAP)/Health Clerk and School Nurse categories whether you think this particular service is always, sometimes, never the responsibility of the UAP or school nurse? Thank you very much for your participation.

**School Nurse,
Lynn Shieh**

A-Always
S-Sometimes
N-Never

- 1) Performs routine first aid procedures and assists in screening ill and/or injured children.
- 2) Performs a variety of routine clerical duties.
- 3) Screens student records for proper immunizations and alerts parents of needed immunizations.
- 4) Notifies parents of the clinic program and schedules appointments for the physical examination.
- 5) Assists with the preparation and arrangements for health testing programs performed by the school nurse.
- 6) Coordinates and implements mandated programs: vision and color vision, hearing and scoliosis requirements.
- 7) Participates and provides health information to students and Student Study Team.
- 8) Conducts medical case findings, assessments, screening, referrals and follow-up activities related to students suspected or identified as having health problems.
- 9) Prepares, distributes, and maintains First Aid and Disaster First Aid Kits for school classrooms.
- 10) Maintains an accurate list of students with serious health problems and distributes it to administrators and teachers.
- 11) Maintains a daily log of students receiving first aid.

[illegible]

A-Always
S-Sometimes
N-Never

- 12) Maintains the health office Inventory and orders supplies when necessary.
- 13) Maintains health office and equipment in a clean and orderly manner.
- 14) Provides initial and triennial health assessments of special education and other students, if needed.
- 15) Serves as a resource person to teachers and students in health education.
- 16) Assures that written doctor's or nurse practitioner's orders and signed permission slips are on file for all medications to be administered to students.
- 17) Administers medications to students as instructed by doctors or nurse practitioners and parents.
- 18) Maintains an accurate list of students exempted from the health care program.
- 19) Maintains files and duplicate materials, as needed.
- 20) Assists with classroom inspections for communicable diseases, such as lice.

Responsibilities of UAP			School Nurse		
A	S	N	A	S	N

- 21) Are there services not listed which you feel the Unlicensed Assistive Personnel (UAPs)/Health Clerk should be providing to the school?
If yes, please list them

- 1.
- 2.
- 3.

Demographic Information

Please place a check mark in the space before all items that apply.

1. What is your age in years?
☐ 20-29 ☐ 30-39 ☐ 40-49 ☐ 50-59 ☐ 60+
2. What is your gender?
☐ Female ☐ Male
3. What is your marital status?
☐ Single ☐ Married ☐ Divorced ☐ Widowed
4. Do you have children?
☐ Yes ☐ No
5. What is the highest educational level you have attained?
☐ Some High School ☐ High School ☐ BS/BA
☐ MS/MA ☐ Ph.D. ☐ Other
6. In which discipline(s) are you educated?
☐ High School ☐ Nursing ☐ Education
☐ Public Health ☐ Philosophy ☐ Other
7. How many years of school experience do you have?
☐ 0-4 ☐ 5-10 ☐ 11-14 ☐ 15-19 ☐ 20-24
☐ 25+
8. How old (in years) are the students with whom you work?
 Please check all that apply
☐ 0-4 ☐ 5-10 ☐ 11-14
9. Are you hired to work
☐ Part time (0-50%) ☐ Full time (51% or more)
10. What is your ethnicity?
☐ African American ☐ Asian American ☐ Caucasian
☐ Hispanic American ☐ Middle Eastern American
☐ Pacific Islander ☐ Indian ☐ South East Asian
11. What is the ethnicity of the students with whom you work?
 Check all that apply
☐ African American ☐ Asian American ☐ Caucasian
☐ Hispanic American ☐ Middle Eastern American
☐ Pacific Islander ☐ Indian ☐ South East Asian
12. What is/are your title(s)?
☐ Administrator ☐ Secretary ☐ Clerk
☐ School Nurse ☐ Health Clerk ☐ Other
13. Is there an Unlicensed Assistive Personnel/Health Clerk working in your school?
☐ Yes ☐ No ☐ NA
 If yes, how many days a week is he/she working in your school?
☐ 1 day ☐ 2 days ☐ 3 days ☐ 4 days ☐ 5 days
14. How many days a week do you have a school nurse working in your school?
☐ 2 days ☐ 3 days ☐ 4 days ☐ 5 days ☐ NA

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ABSTRACT

DIFFERENTIATION IN ROLES OF

SCHOOL NURSES AND UNLICENSED ASSISTIVE PERSONNEL

By Lynn Shieh, RN, BSN, PHN

School nurses provide a vast number of health services for students, teachers, and staff. Despite school nurses' important contributions to the health status of students, through the years their positions have been gradually supplemented by Unlicensed Assistive Personnel (UAP) / Health Clerks. With the number of UAPs increasing in the school setting, roles and responsibilities of school nurses and UAPs need to be clearly differentiated in order to utilize the UAP's services legally and efficiently. This research used a descriptive survey to investigate the perceptions that differentiate the role of school nurses and UAPs among school administrators, nurses, UAPs, secretaries, and office clerks in a selected Northern California school district. The study described their views about the responsibilities of school nurses or UAPs for specific tasks in health services. A job description was developed based on the results of the survey to provide clear guidelines of the UAP's responsibilities to school personnel.

Table 2

Question	Unlicensed Assistive Personnel Responsibility		Nurse Responsibility	
	Primary	Secondary	Primary	Secondary
1. Performs routine first aid procedures and assists in screening ill and/or injured children.	X		---	---
2. Performs a variety of routine clerical duties.	X			X
3. Screens student records for proper immunizations and alerts parents of needed immunizations.	X		X	
4. Notifies parents of the clinic program and schedules appointments for the physical examination.	X			X
5. Assists with the preparation and arrangements for health testing programs performed by the school nurse.	X			X
6. Coordinates and implements mandated programs: vision and color vision, hearing and scoliosis requirements.		X	X	
7. Participates and provides health information to students and Student Study Team.	---	---	X	
8. Conducts medical case findings, assessments, screening, referrals and follow-up activities related to students suspected or identified as having health problems.	---	---	X	
9. Prepares, distributes, and maintains First Aid and Disaster First Aid Kits for school classrooms.	X	---		X
10. Maintains an accurate list of students with serious health problems and distributes it to administrators and teachers.	X		---	---
11. Maintains a daily log of students receiving first aid.	X			X
12. Maintains the health office inventory and orders supplies when necessary.	X			X
13. Maintains health office and equipment in a clean and orderly manner.	X			X
14. Provides initial and triennial health assessments of special education and other students, if needed.		**	X	
15. Serves as a resource person to teachers and students in health education.		---	X	
16. Assures that written doctor's or nurse practitioner's orders and signed permission slips are on file for all medications to be administered to students.	X		X	
17. Administers medications to students as instructed by doctors or nurse practitioners and parents.	X		X	
18. Maintains an accurate list of students exempted from the health care program.	X		---	---
19. Maintains files and duplicate materials, as needed.	X		X	
20. Assists with classroom inspections for communicable diseases, such as lice.	X		X	

** Indicates a strong response of "NEVER".

--- Indicates no clear preference.

Table 1

Job Description of Unlicensed Assistive Personnel

1. Performs routine first aid procedure and assists in screening ill and/or injured students.
 2. Performs a variety of routine clerical duties. Maintains files and duplicate materials, as needed.
 3. Screens student records for proper immunizations and alerts parents of needed immunization.
 4. Notifies parents of the clinic program and schedules appointments for the physical examination.
 5. Assists with the preparation and arrangements for health testing programs performed by the school nurse.
 6. Prepares, distributes, and maintains First Aid and Disaster First Aid Kits for school classroom.
 7. Maintains an accurate list of students with serious health problems and distributes it to administrators and teachers.
 8. Maintains a daily log of students receiving first aid.
 9. Maintains the health office inventory and orders supplies when necessary.
 10. Maintains health office and equipment in a clean and orderly manner.
 11. Assures that written doctor's or nurse practitioner's orders and signed parent/guardian permission slips are on file for all medications to be administered to students.
 12. Administers medications to students as instructed by doctors or nurse practitioners and parents.
 13. Maintains an accurate list of students exempted from the health care program.
 14. Assists with classroom inspections for communicable diseases, such as lice.
-

Title: Differentiation in roles of school nurse and unlicensed assistive personnel

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Date: January 2000.

The purpose of this descriptive correlational study was to investigate the perceptions and differentiate the role of school nurses and unlicensed assistive personnel (UAPs) among school personnel in a Northern California school district. Research questions include: (a) which school nursing services are viewed as “always” the responsibility of school nurses or UAPs; (b) which school nursing services are viewed as “sometimes” the responsibility of school nurses or UAPs; and (c) which school nursing services are viewed as “never” the responsibility of school nurses or UAPs. The School Nursing Services Questionnaire was designed by the researcher and used to collect data from participants. The survey included 21 questions. The first 20 questions measured the perceptions of each participant regarding the responsibilities for particular nursing tasks. The participants indicated with a check mark in one of three columns under the UAP and School Nurse categories whether they felt the particular task was "always", "sometimes", or "never" the responsibility of UAP or the School Nurse. Item 21 asked about services not listed which participants felt the UAPs should be providing to the schools. The last page of the questionnaire asked for demographic data from participants.

This study evaluated their perceptions of the responsibilities of school nurses or UAPs for specific tasks in health services. A job description of UAPs was developed to provide clear guidelines of the UAP's responsibilities to school personnel based on the results of the survey.

The sample population (N=41) was divided into school nurses and others. The others sample population included (a) school administrators, (b) UAPs/health clerks, (c) secretaries, and (d) office clerks. The survey responses were analyzed using two sample groups (school nurses and others) and divided into three categories (always, sometimes, and never). The findings suggested that both groups agreed with implementing state mandated vision, hearing, and scoliosis screening, providing health information, and serving as a resource person would never be the responsibilities of unlicensed assistive personnel. Both groups agreed that tasks of (a) routine clerical duties, (b) assistance to parents and nurse's, and (c) maintenance of health office, supplies, and records would be "always" unlicensed assistive personnel's responsibilities. The survey also showed that most respondents agreed that notifying parents of the clinic programs, arranging for health testing programs, and coordinating state mandated programs would "always" be tasks for licensed nurses.

The findings showed that both groups agreed that tasks of (a) preparing First Aid Kits, (b) conducting medical case finding, and (c) assuring all medication slips on file are signed by doctors and parents would "sometimes" be the responsibility of licensed nurses. A table of nursing tasks was summarized according to the weighted responses of each question from the sample population. This table provided clear illustration of nursing tasks which were listed as primary responsibility of UAPs by respondents. A job description of UAP was developed based on those nursing tasks to provide clear guidelines of the UAP's responsibilities to school personnel. This survey has provided a tremendous knowledge background for the job description development.